RATE ASSESSMENT TOOL
Directions for Electronic Tool

Opening the Rate Assessment Tool

Step 1: Double click on the Rate Assessment Tool Electronic Final Version 3.0.xls document

Step 2: A message will appear stating:

"Rate Assessment Tool Electronic Final Version 3.0.xls should be opened as a read-only unless you need to save changes to it. Open as a read-only?"

Step 3: Click on the Yes button

This opens the document as a read-only, follow the directions under "Saving the Rate Assessment Tool" below to save the specific data you are entering.

Step 4: Some of you may get a message stating the following:

"The macros in this project are disabled. Please refer to the online help or documentation of the host application to determine how to enable macros."

Step 5: Click OK

Step 6: To enable the macros complete the following:

- Click on the "Tools" menu
- Click on the "Macro" menu
- Click on "Security"
- Change the security level from "High" to "Medium"
- Click OK

Please Note: The macros allow you to use the "Print" work sheet to print the rate assessment tool. You do not need to enable the macros to use the rate assessment tool. If you choose not to enable the macros, you can always print the tool by completing the following steps:

- Click on the "File" menu
- Click on the "Print" menu

– In the area that says "Print What" choose either "Entire Workbook" (prints all work sheets in the work book) or "Active Sheet(s)" (prints only the work sheet you are currently working in)

– Click OK

Once the document is opened, there are nine work sheets or tabs within the Rate Assessment Tool Electronic Final Version 3.0 work book. They are:

- ❑ Print
- ❑ Section 1 Part 1
- ❑ Section 1 Part 2
- ❑ Section 2 Part 1
- ❑ Section 2 Part 2
- ❑ Section 3
- ❑ Section 4
- ❑ Section 5
- ❑ Section 6

The Print tab allows you to print all or part of the rate assessment tool while the remaining tabs correspond to the sections of the tool.

Using the Print Tab

Step 1: Click on the Print tab

Step 2: Click on the Print button associated with the section(s) you want to print

Using All Other Tabs

Step 1: Click on the tab at the bottom of the screen that corresponds to the section where you want to enter data

Step 2: Click on the cell where you want to enter data

Step 3: Using the drop down button, select one of the choices (you will only be able to enter data in the space(s) corresponding to the responses)

Step 4: If you attempt to enter data outside of these spaces, you will get a warning message and no data will be entered

Step 5: If this occurs, click on the Okay button and click on the correct cell to continue entering data

Saving the Rate Assessment Tool

Before entering any data, you should save the Rate Assessment Tool to your hard drive or network server. It is recommended that all completed rate assessment tools are saved to the same location. To save the document complete the following steps:

Step 1: On the Menu bar, click on File and choose Save As

Step 2: The Save As menu will appear and you need to name the document and indicate where the file should be saved to (i.e. which directory and folder)

IMPORTANT: Please write down the folder to which you saved it to.

Step 3: Click on the Save button

Step 4: You now have two Rate Assessment Tool documents:
- The first document is the original read-only document
- The second document contains the data you have entered for a specific consumer

Step 5: To enter data for another consumer, go back to the read-only Rate Assessment Tool and follow the steps outlined above; be careful not to use the document you have created for a specific consumer as you may write over and potentially lose data